

**2015.05060**  
**Release Notes**

March 19, 2017



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## Contact and Support Information

Product and account information can be accessed by visiting Customer Support online at [Support.CCH.com](http://Support.CCH.com). In addition to product and account information, the Customer Support site offers answers to our most frequently asked questions, forms release status, Knowledge Base articles, training videos, and operating systems compatibility. Access to these features is available 24/7.

The following website provides important information about the features and updates included in all CCH® ProSystem fx® Tax releases: [Release Notes](#)

Visit the [Application Status](#) Web page to view the current status of our CCH applications. The Application Status Web page is updated every 15 minutes.

Go to [Contact Us](#) to find information on topics such as Sales and Billing, as well as options to Open a Support Case or Chat with a Representative if you need assistance.

## Information in Tax Year 2015 Release Notes

Tax Release Notes inform you of the enhancements and updates that have been made to Tax products and systems with the current release.

Updates provided in the Release Notes include the following:

- Contact and Support information
- Updates to the Tax technology (electronic filing updates, Pro Forma, Organizer, technology enhancements)
- Updates made to Tax products (form additions and updates, diagnostic updates, changes caused by regulatory updates)

### Tax Updates

#### Pro Forma

The following Pro Forma issues have been resolved:

#### Partnership

New York. New York City. NYC NOL Amount Previously Absorbed, now pro formaes to a new sheet of New York City > Schedule C and Schedule F > Net Operating loss Deduction (Interview Form NYC6, Boxes 90-129).

Pennsylvania. City of Philadelphia. Overpayment on Form BIRT, Line 10, now pro formaes to Philadelphia > Payments/Penalties > Philadelphia BIRT Payments > Credit from prior year BIRT payments (Interview Form PHI1, Box 75).

#### Partnership, Corporation, and S Corporation

Wisconsin. 2015 Research credit on Schedule R, line 8, instead of line 11, now pro formaes to Wisconsin > Credits > Schedule R Research Credits > Prior Year Research Expenses > 1st Prior Year (Interview Form WI23, Box 62).

Our Update Pro Forma feature is now available for this issue.

#### Fiduciary

The following Pro Forma issues have been resolved:

- Federal. The CUSIP number pro formas to the correct field on Income > Interest (Interview Form 1099INT, Box 87).
- Maryland. Local tax is now included in the prior year tax amount on Maryland > Underpayment Penalty Information > Exception B - prior year tax (Interview Form MD3, Box 65).
  - ◆ Our Update Pro Forma feature is now available for this issue.
- Oklahoma. Prior year overpayment applied now sources from Form 513, Line 35, or Form 513NR, Line 39.
  - ◆ Our Update Pro Forma feature will be available for this issue with Release 2016.03020, scheduled for Sunday, March 26, 2017.

## Product Updates

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### Fiduciary (1041) Product Updates

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#### Federal

The Tax-exempt bond CUSIP number on the IRS-1099INT input will now pro forma to the appropriate field.

#### Maryland

Maryland local tax will be included in the prior year tax amount on Maryland > Underpayment Penalty Information > Exception B - prior year tax (Interview Form MD3, Box 65).

#### Oklahoma

Oklahoma Forms 513 and 513NR. Prior year overpayment applied will now pro forma to Payments/Penalties > Payments > State Estimated Tax Payments > Prior year overpayment applied field and be coded to Oklahoma (Interview Form OK3, box 39).